

| Session 5: Module 11 - CPA-Determined Follow-Up |                                                                                                                                                                                        |
|-------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| SCRIPT                                          |                                                                                                                                                                                        |
| Description                                     | Text                                                                                                                                                                                   |
| 1. Introduction                                 | <b>Welcome</b> to M-SPIRIT <b>Session 5, Module 11</b> , of the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program. |
| 2. Start                                        | <no script>                                                                                                                                                                            |
| 3. <cpa1>                                       | In this module, the last in Session 5, we are going to review the CPA Determined Follow-up section.                                                                                    |
|                                                 | This section is where you select Issuance Frequency, which displays in the Household Member Information section.                                                                       |
|                                                 | You are not required to open this window to complete the CGS, but as a general rule, you should select Issuance Frequency for all participants at the certification appointment.       |
|                                                 | Click on the link to open the screen.                                                                                                                                                  |
| 4. <cpa2>                                       | The Issuance Frequency is required once this window has been opened.                                                                                                                   |
|                                                 | Click the Issuance Frequency drop-down arrow.                                                                                                                                          |
| 5. <cpa3>                                       | Typically, we provide benefits every 3 months, however, since Lilly is turning 5 in 2 months, we are going to select bi-monthly issuance.                                              |
| 6.                                              | Click OK                                                                                                                                                                               |
| 7. <menu1>                                      | The CPA Determined Follow-up function is important when issuing benefits...                                                                                                            |
|                                                 | ...because Issuance Frequency can only be changed in two places in M-SPIRIT...                                                                                                         |
|                                                 | ...and neither of them is in the Issue Benefits screen.                                                                                                                                |
|                                                 | The functionality to change the Issuance Frequency is only available in the CGS or via the Participant Activities menu in the Participant Folder.                                      |
| 8. <menu2>                                      | We've already reviewed the function in the CGS, so let's click on the Participant Activities menu in the participant folder.                                                           |
| 9. <menu4>                                      | Select Review CPA-determined Follow-up Information from the menu.                                                                                                                      |
|                                                 | The window and its functionality is exactly the same as the CGS.                                                                                                                       |
| 10.                                             | Go ahead and change the issuance frequency to monthly.                                                                                                                                 |
| 11.                                             | No script                                                                                                                                                                              |
| 12.                                             | No script                                                                                                                                                                              |

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| <b>13. Questions</b>                            | Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Questions forum on the Montana WIC website. |